



## **Before You Begin | A Guide to Grants QSMO's Investment Reviews**

If you have not yet reviewed the Grants QSMO Marketplace, please visit <https://ussm.gsa.gov/marketplace/grm/>. Before partnering with the Grants QSMO to plan an investment in grants IT, all Federal Awarding Agencies should first review the [Grants QSMO Marketplace](#) to determine whether the validated solutions/services on the Grants QSMO Marketplace might be able to meet your grants IT requirements.

If Grants QSMO Marketplace offerings will not meet your grants IT requirements, OMB Memos M-19-16, M-21-20, and M-22-12 require agencies to engage the Grants QSMO when considering a grants IT investment. Once the determination is made that the Marketplace offerings are not a fit, Grants QSMO will launch our *Grants IT Investment Review* process with the Federal Awarding Agency. This accompanying investment review process ensures that an agency investing in grants IT aligns the project to the Grants QSMO's Seven Guiding Principles for Grants Technology Modernization, leverages the Grants QSMO's existing market research, shared resources, and best practices (e.g., GSA's [M3 Playbook](#)), and avoids duplicative investments across the government.

The goals of Grants QSMO's *Investment Reviews* are to:

- Modernize, automate, & standardize grants management processes/systems;
- Drive adoption of Grants QSMO's Marketplace of shared solutions/services;
- Align grants IT investments to the Federal Integrated Business Framework (FIBF) for grants management and to Grants QSMO's Guiding Principles for Grants Technology Modernization (e.g., adherence to data standards);
- Gradually achieve IT consolidation within agencies & reduce overall grants IT footprint; and
- Minimize burden on Agency and SSP partners while executing an efficient and streamlined investment review process.

The first step of this process is for the Agency or SSP to submit the basic details of your project using the Investment Details Form. Our team will assess whether your investment falls within our pre-determined investment types and dollar thresholds on page 3. (Grants QSMO will make exceptions to these investment types and dollar thresholds on a case-by-case basis.) We will contact you if your investment requires our review (which will include you preparing an Investment Action Plan (IAP)). For those investments that do not require our review, we will respond and provide you with the IAP template and recommend you use it as a best practice tool to develop your investment.

## What is the Grants QSMO?

The Office of Management and Budget (OMB) formally designated the U.S. Department of Health and Human Services (HHS) as the Grants Quality Service Management Office (Grants QSMO) on January 11, 2021, to lead modernization efforts of the end-to-end Federal grants management process. With this designation, the Grants QSMO aims to drive standardization and modernization of grants management systems to increase efficiency and reduce burden for grant applicants, recipients, and the Federal grants workforce.

## What is the Grants QSMO's Role in Investment Planning?

Per OMB Memos [M-19-16](#), [M-21-20](#), and [M-22-12](#), Federal awarding agencies and SSPs are required to coordinate with the Grants QSMO on any potential investments in grants IT for any part of the grants lifecycle. Grants QSMO will conduct reviews of an agency's or SSP's planned investment, provide feedback in the development of an Investment Action Plan, and make a recommendation to OMB for approval (with conditions, as applicable).

## What are the Grants QSMO's "7 Guiding Principles for Grants Technology Modernization"?

### 1. Customer Focus & Improved Mission Delivery

- If existing solution, high customer satisfaction
- Detailed user-centered design approach
- Robust and transparent customer feedback loops

### 2. Guide Agencies on Adoption of Business, Data, & Technology Standards

- Solution meets government-wide business and data standards (e.g., [FIBF Standard Data Elements](#), [GREAT Act](#))
- Solution architecture provides for data connectivity (e.g., via API management and data infrastructure)

### 3. Make Purposeful & Strategic Investments

- Confirmed customers with identified funding
- Accessible and able to scale government-wide
- Clear support and commitment from agency's leadership (including agency's Office of the Chief Information Officer (OCIO) and Senior Accountable Point of Contact (SAPOC))
- Scalable, tiered pricing model

### 4. Balance Promoting Innovation with Stability of Operations

- Fit-for-purpose use of innovative technology that advances business need
- Innovation and investment roadmap defined
- Reliable reporting of cost, operational performance

### 5. Adhere to CIOC, Security, and Emerging Technology Standards

- Meets current standards (e.g., CloudSmart, FedRAMP)
- Data migration and integration leverages innovative and modern exchange technologies (e.g., API, microservices)

### 6. Treat Data as a Strategic Asset

- Data is readily accessible to assess performance, risk, process, and compliance
- Government maintains ownership of data

## 7. Employ Agile Development of Interchangeable, Interoperable Solutions

- Modules are interoperable
- Defined agile approach to develop and test new capabilities
- Robust project management approach and clearly defined milestones

### Which Investment Types and Dollar Thresholds Require our Review?

Investment Types Within Grants Lifecycle*	Example Investments	Grants QSMO Actions	Investment Action Plan (IAP) Required?
<b><u>Federal Shared Services Adoption*</u></b> Agency implementation or adoption of existing shared solution/service	<ul style="list-style-type: none"> <li>• Adoption of a Federal Grants QSMO Marketplace solution/service</li> </ul>	Advise agency on existing shared services and support customer-provider relationships.	<i>Not Required</i> **
<b><u>Operations &amp; Maintenance (O&amp;M):</u></b> <b>Agencies</b> - O&M investments for existing solution/service > <b>\$5M</b> <b>SSPs</b> – O&M investments for existing solution/service > <b>\$10M</b>	<ul style="list-style-type: none"> <li>• Substantial enhancement in capabilities/services provided</li> </ul>	Conduct review of email, provide templates and best practices to support development of the investment.	<i>Unlikely</i> **
<b><u>Development, Modernization, Enhancement, or Acquisition (DME or Acquisition):</u></b> Development/Acquisition of new solution/service or Modernization/Enhancement of existing solution/service > <b>\$2.5M</b>	<ul style="list-style-type: none"> <li>• Development of new solution/service</li> <li>• Replacement of major module/service; change in vendor</li> <li>• Acquisition of commercial solution/service</li> <li>• Consolidation of multiple solutions/services within Agency/SSP</li> <li>• Substantial enhancement in capabilities/services provided</li> </ul>	Provide market research and investment best practices, support development of IAP, review IAP and acquisition package, submit IAP to OMB with recommendation to approve.	<i>Likely</i> **
<b><u>Investment Follow-Up</u></b> Grants QSMO conducts follow-ups in the form of reviewing acquisition documents, supporting agency acquisition processes where helpful, and following up on conditions of approval for the investment.			

\* *Process will be updated when Future Commercial Offerings become available*

\*\* *At the discretion of the Grants QSMO*

### What are Grants QSMO's Key Considerations During an IAP Review?

1. Justification for Exception to Grants QSMO Marketplace
2. Business Risk(s)
3. Technical Risk(s)
4. Alignment to Standards
5. Program Management and Cost(s)
6. Customer Experience and Diversity, Equity, Inclusion, & Accessibility



### **Requirements**

Agencies and SSPs requesting funds for a grants IT investment are required to respond to all questions in this IAP and complete all the open text fields. Agencies and SSPs are encouraged to engage the appropriate agency stakeholders, points of contact, and subject matter experts within their organization to collect the necessary information to respond to each question.

### **Submission**

Please submit your completed IAP to [GrantsQSMO@hhs.gov](mailto:GrantsQSMO@hhs.gov).

### **Next Steps: Grants IT Investment Review Process**

Once received, Grants QSMO will review your IAP to ensure its completion and compliance with items listed in Appendix C, and will follow-up with any questions or recommended edits. Our team will then submit your IAP to OMB and GSA/OSSPI for their optional, preliminary review. After we coordinate with OMB, you can expect to receive follow-up communications from Grants QSMO that will ultimately lead to Grants QSMO submitting your final IAP to OMB with our endorsement and recommendation for approval.

See Appendix B and C for additional details regarding Approval Conditions and Grants QSMO's Evaluation Criteria.

### **Comments or Questions?**

If you have any comments or questions regarding this process and/or your Investment Action Plan, please reach out to the Grants QSMO at [GrantsQSMO@hhs.gov](mailto:GrantsQSMO@hhs.gov).

*Thank you for partnering with the Grants QSMO  
to complete your Investment Action Plan!*

**Investment Details** | Please provide the investment details that you submitted in your *Investment Details Form*.

**Name of Agency or Shared Service Provider**

**Contact Information for questions related to *Investment Details Form***

**Contact Information for Investment Owner**

**Investment Type**

*Please select all that apply:*

- Shared Services Adoption
- Operations and Maintenance (O&M)
- Development, Modernization, & Enhancement (DME)
- Acquisition
- Other (please specify) \_\_\_\_\_

**Name of existing solution that might be affected (modernized or replaced)**

**Estimated Investment Dollar Amount (for the entire lifecycle of the investment)**

**Fiscal Year of project execution**

**Funding Source**

*Please select all that apply:*

- Agency appropriations
- Working capital funds
- Nonrecurring Expenses Fund (NEF)
- Service and Supply Fund (SSF)
- Other (please specify) \_\_\_\_\_

**Please state whether your agency plans to request Technology Modernization Funds (TMF) to address a grants IT requirement.**

**Brief Description of Scope** (including, but not limited to, grants lifecycle phase<sup>\*</sup>, name of sub-tier agencies affected, etc.):

<sup>\*</sup> *Federal Business Lifecycle for Grants Management* defined [here](#).

**Key Considerations** | Please submit your responses to the following sections in the text boxes provided.

**Justification for Exception to Grants QSMO Marketplace:**

- A. Please explain why Grants QSMO's current Marketplace offerings will not meet the requirements for your proposed investment. Have you consulted with the Grants QSMO about the potential for future Marketplace offerings that could meet your needs?

**Business Risk(s):**

- A. What operational efficiencies, audit findings, etc. will be addressed by the alternative solution?
- B. When does the agency’s contract for the current solution expire? Are there options for extension?
- C. What drivers are prompting the agency’s investment (e.g., Congressionally-mandated timelines, impending end-of-life for existing solutions, funding expiration, etc.)?
- D. How does the scope and operational end state align to the agency’s overarching technology vision?
- E. Explain how this investment demonstrates clear support and commitment from the agency's leadership and across all affected lines of business (including agency’s Office of the Chief Information Officer (OCIO) and Senior Accountable Point of Contact (SAPOC)<sup>1</sup>).
- F. How has the agency assessed its organizational readiness for change, and how has it defined a change management approach and strategies (e.g., via a Workforce Assessment<sup>2</sup>)? Does the Workforce Assessment clearly identify impacted workforce and a strategy for addressing the impact?

<sup>1</sup> Per OMB Memo M-19-16 (<https://www.whitehouse.gov/wp-content/uploads/2019/04/M-19-16.pdf>) all CFO Act agencies have a SAPOC responsible for coordinating actions across the agency to support adoption of the shared service strategies.

<sup>2</sup> GSA has a valuable resource known as the [M3 Playbook](#) (Introduction to Modernization and Migration Management) which is a framework to help agencies achieve successful outcomes and reduce risk during system modernizations and migrations. Please see [Phase 1.7 of the M3 Playbook for help on “Defining Change Management Approach”](#) and [Phase 1.8 on “Defining Stakeholders and Developing Communications Plan.”](#)

**Technical Risk(s):**

- A. How old is the agency's current solution? What is the name of the platform or software used by the current solution?
- B. Does the current solution have security risks/vulnerabilities?
- C. Will the implementation of the new solution result in a reduced number of legacy solutions (assuming the legacy solutions will be decommissioned)?
- D. What other systems will be affected by this investment and in what way? How will those other systems' requirements be addressed?
- E. Has the agency considered whether there is a need for an interface with other critical systems (e.g., financial management systems) in order to support agency-wide goals for centralized data, interoperability, etc.?
- F. If a financial system may be affected, explain how the agency has coordinated with the Financial Management (FM) QSMO to ensure alignment to the FM QSMO's vision and guiding principles for IT investments. (To contact the FM QSMO, send an email to [fmqsmo@fiscal.treasury.gov](mailto:fmqsmo@fiscal.treasury.gov)).



**Alignment to Standards:**

- A. How is the agency's current solution aligned to the [FIBF Standard Data Elements for Grants Management](#)? How does the agency plan to ensure that this new investment will adhere to [FIBF Standard Data Elements for Grants Management](#)? (Please answer the question with the context that technical specifications for all grants management standard data elements are not yet complete, limiting the guidance for implementation.)
- B. How is the agency aligning [to the FIBF Business Standards for Grants Management](#) and other business and technology standards (e.g., CloudSmart, FedRAMP, etc.) and other emerging best practices?
- C. If this investment will affect a financial management system, require an interface to a financial management system, and/or generate any financial management transactions, how will the agency ensure this investment adheres to the Business Information Exchange (BIE) data element lists and business logic for Federal Financial Management?
- D. Are there deviations or unique requirements? Are they justified by legislation?

**Project Management and Cost(s):**

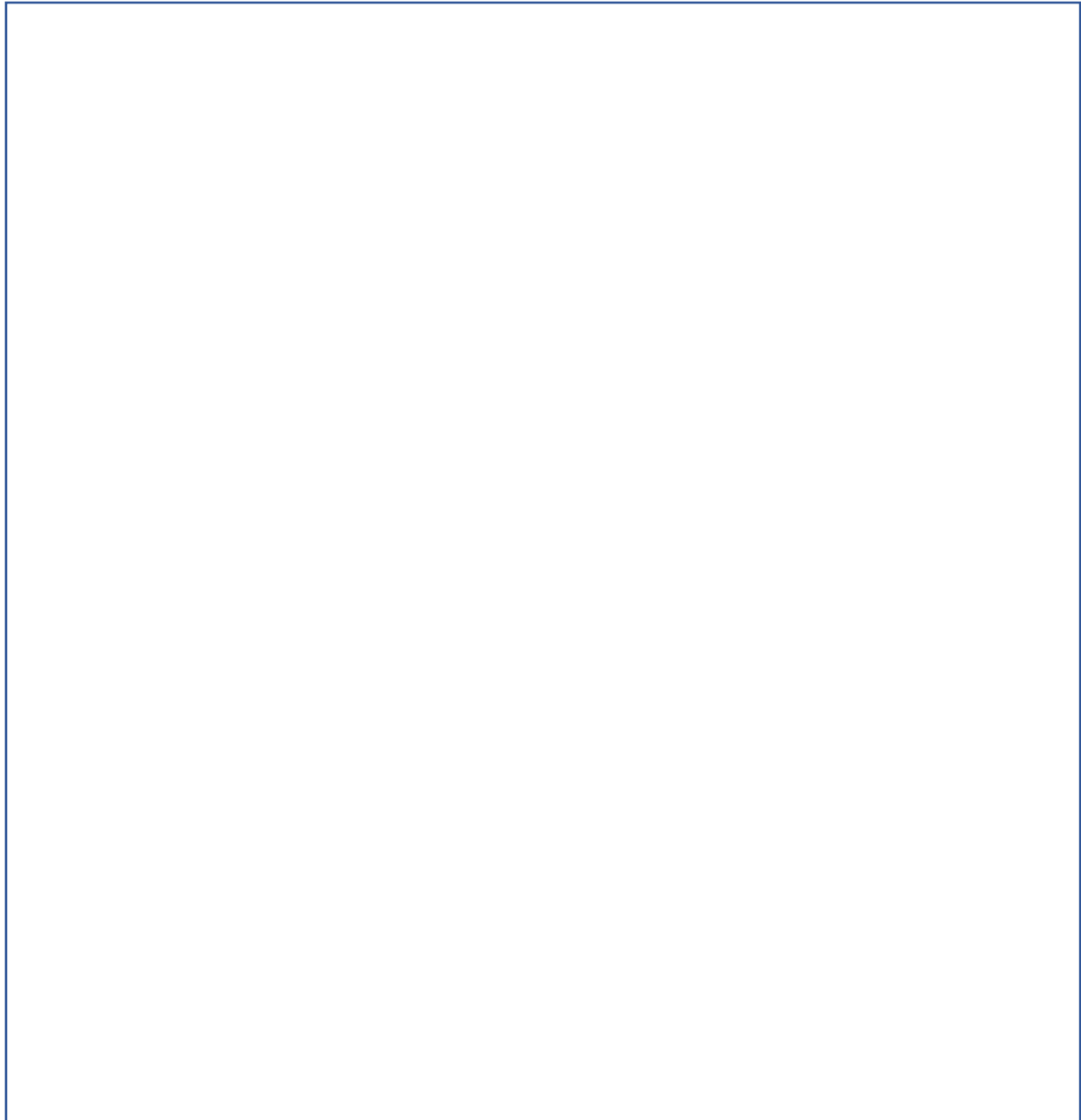
- A. Who is the sponsor for the investment and does it have cross-agency executive support?
- B. Have you identified all Key Stakeholders and developed an appropriate communications plan?
- C. Are you able to show benchmarking/market research for similar projects/solutions to demonstrate your estimated costs are reasonable?
- D. Please share your implementation plan and explain how it leverages [GSA's M3 Playbook](#)<sup>3</sup> and demonstrates an agile, phased approach for your solution.
- E. Does this investment and implementation approach position your agency to scale up this solution to become a shared service available to external federal customers? If so, please describe.
- F. Please complete the cost table below and provide supporting Capital Planning and Investment Control (CPIC) documentation to Grants QSMO to better understand the breakout of costs required for your proposed investment.

Investment Type	Funding Source	FY 20__	FY 20__	FY 20__	FY 20__	FY 20__	TOTAL (\$D)
DME (\$D)							
O&M (\$D)							
<b>Total (\$D):</b>							

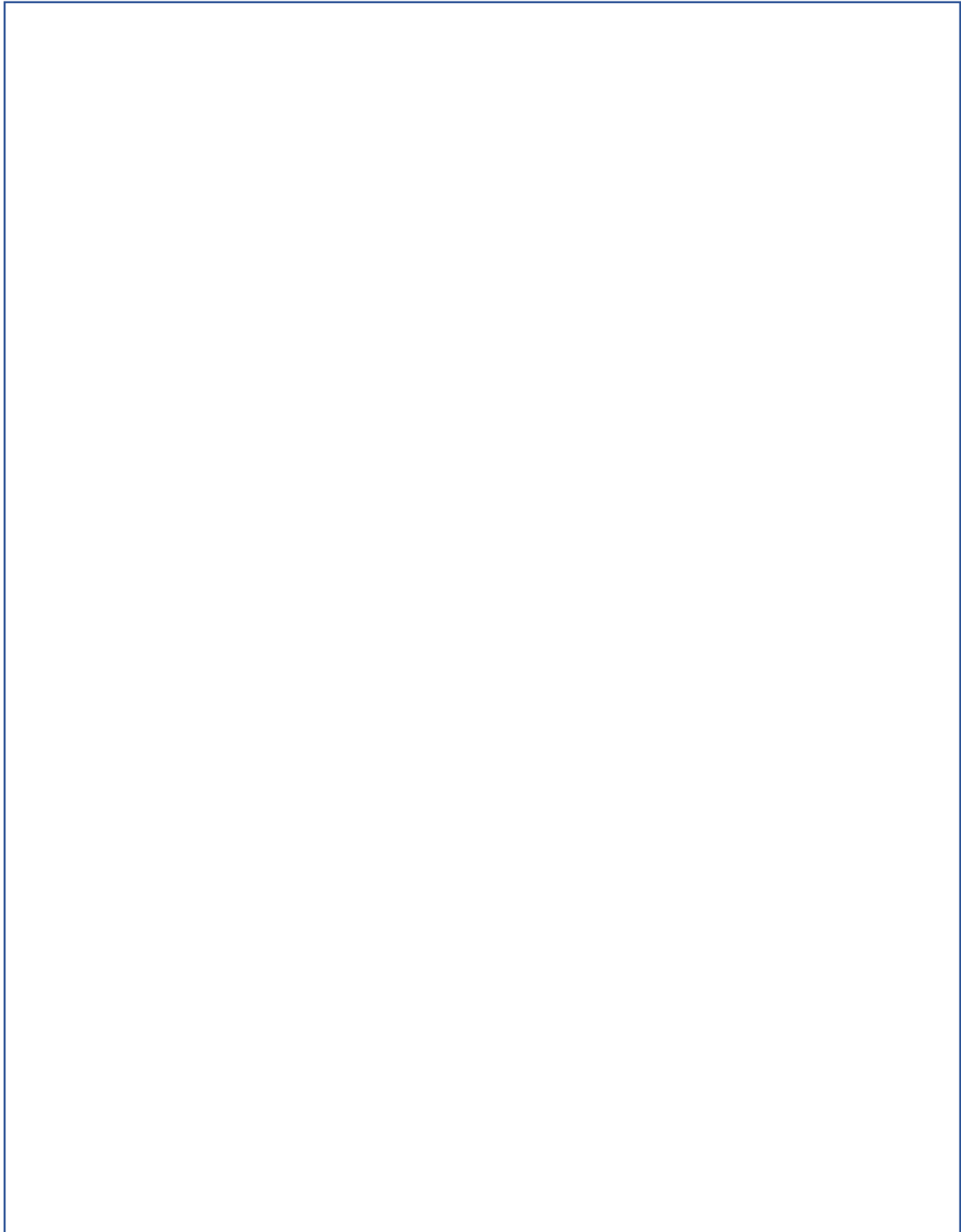
<sup>3</sup> GSA has a valuable resource known as the [M3 Playbook](#) (Introduction to Modernization and Migration Management) which is a framework to help agencies achieve successful outcomes and reduce risk during system modernizations and migrations.

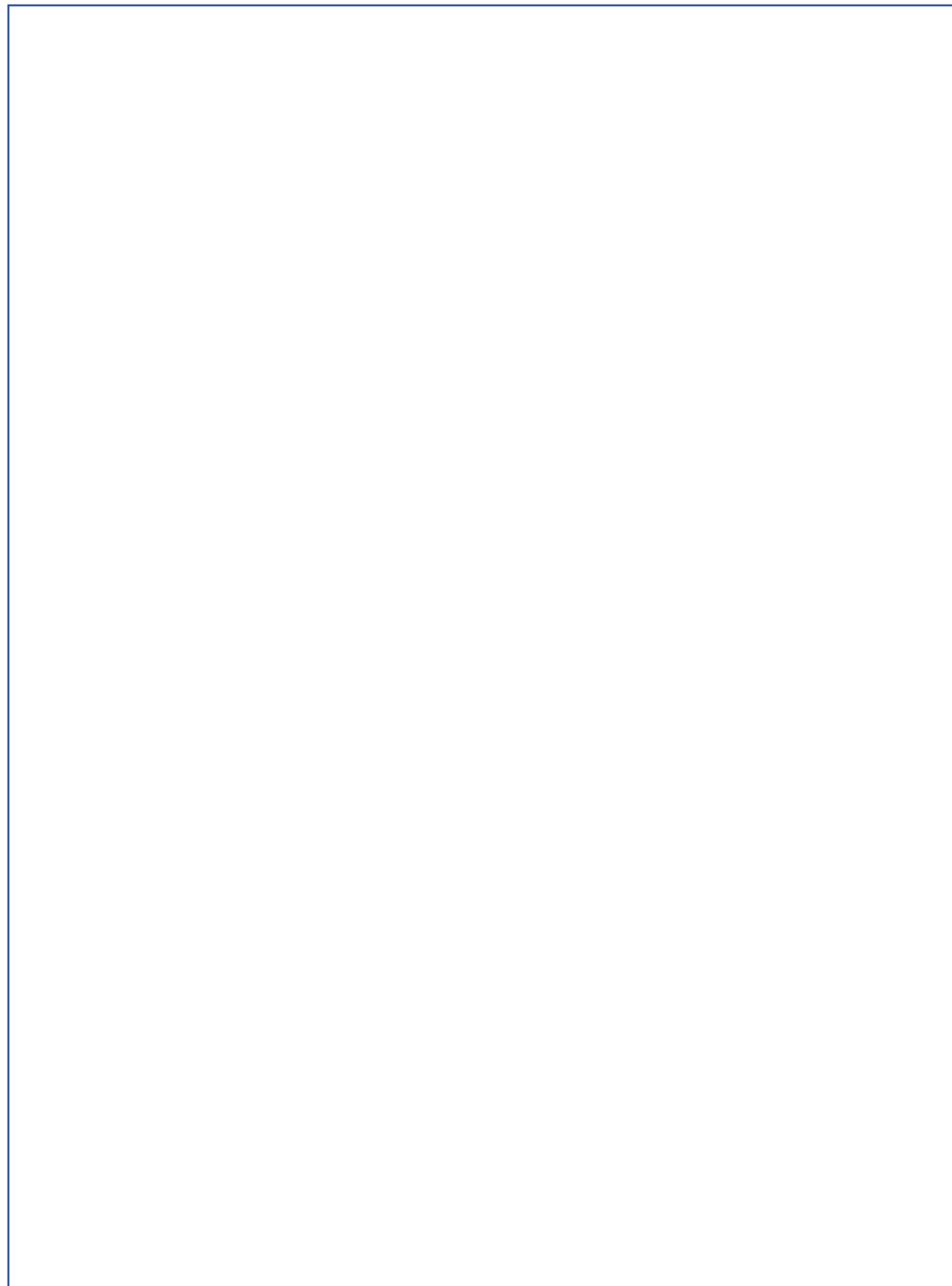
## Customer Experience and Diversity, Equity, Inclusion, & Accessibility

- A. Please elaborate on any innovations for grants management and administration that your solution/service delivers, specifically its technical abilities to reduce user accessibility barriers, such as mobile-friendly platforms, low-complexity interface, and 508 compliance (related to President Biden’s two Executive Orders on advancing racial equity (<https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/20/executive-order-advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government/>) and transforming customer experience (<https://www.whitehouse.gov/briefing-room/presidential-actions/2021/12/13/executive-order-on-transforming-federal-customer-experience-and-service-delivery-to-rebuild-trust-in-government/>)).



***If you need additional space to respond in full to any of the questions listed above, please use the text boxes on Page 12 and 13 and specify to which question you are responding.***

A large, empty rectangular box with a thin blue border, intended for providing additional responses to the questions listed above. The box is currently blank.



- *End of Investment Action Plan* -

Thank you for completing the Investment Action Plan. The Grants QSMO will be in touch with you regarding next steps soon.

In the meantime, as an effort to promote transparency and collaboration, the **Approval Conditions** and **Evaluation Criteria** (located in Appendices B and C) will be utilized by the Grants QSMO during the review of your investment.

## Appendix A:

### [M-19-16 | Centralized Mission Support Capabilities for the Federal Government](#)

*“As such, legacy providers offering services for which there is a pre-designated or designated QSMO must propose a joint business case with the QSMO to accept any new customers, expand services to existing customers, or make investments in technology or services for these functions...Once an agency is pre-designated as a QSMO for a particular set of mission support functions, agencies shall not issue new solicitations for new or modernized technology or services for these functions unless they have developed a business case, approved by the agency's SAPOC, CIO, QSMO and OMB, to demonstrate that a separate procurement for these services results in better value, considering price, timeline and other appropriate factors.”*

### [M-21-20 | Promoting Public Trust in the Federal Government through Effective Implementation of the American Rescue Plan Act and Stewardship of the Taxpayer Resources](#)

*“To reduce recipient reporting burden and consistent with OMB Memorandum M-19-16 Centralized Mission Support Capabilities for the Federal Government (Apr. 26, 2019), agencies are required to consult with the relevant Quality Service Management Organization (QSMO), prior to developing new or modernized technology, or considering an existing provider, to support execution of ARP.”*

### [M-22-12 | Advancing Effective Stewardship of Taxpayer Resources and Outcomes in the Implementation of the Infrastructure Investment and Jobs Act](#)

*“To facilitate this, agencies are encouraged to coordinate with the Customer Experience team within OMB and required to work with the Grants Quality Service Management Office on any technology needs to support implementation of IJA funded grant and cooperative agreement programs.”*

### [President Biden's Executive Order On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government](#)

### [President Biden's Executive Order on Transforming Customer Experience and Service Delivery to Rebuild Trust in Government](#)

[GSA Introduction to Modernization and Migration Management \(M3\) Playbook](#) | The M3 Playbook consists of guidance and tools to help agencies plan for and navigate transitions. It was developed based on feedback from over 100 Government and industry experts, reflects best practices and lessons learned from prior migrations/modernizations, and is updated annually. M3 segments modernizations and migrations into discrete phases. Each phase includes a series of objectives and recommended activities that are grouped across 4 workstreams: Program Management; Workforce, Organization, and Stakeholders; Technology; and Process and Service Delivery.

Appendix B:

<b>Approval Conditions</b>	
<b>Condition</b>	<b>Description</b>
<b>Data Standards</b>	Implement the grants management data standards, in alignment with any forthcoming determinations from OMB and the Grants Standard Setting Agency regarding associated technical specifications, as well as any future updates to the grants management data standards.
<b>External Customers</b>	Commit to assessing the viability of taking on external customer(s) and becoming a Shared Service Provider on the Grants QSMO Marketplace.
<b>Login.Gov</b>	Adopt (or continue its use of) Login.gov for shared authentication (IAL1) within reasonable timeframes established by the Grants QSMO
<b>Compliance</b>	Comply with all new mandates from Congress, OMB, etc. and complete testing and enter production no later than 6 months before the compliance deadline.
<b>Cost Reduction</b>	Reduce operation and maintenance costs through consolidation of solutions/IT applications within the agency and use of existing shared services. Modernize and standardize business processes and data interchanges to the maximum extent possible, using technology to automate when cost effective to do so. Standardize business processes and data with a view towards eliminating duplicative systems/solutions within the agency.
<b>IT Consolidation</b>	In the future (e.g., 3/5/10 years), when any part of this solution/service is reaching the end of useful life or the end of a supporting contract, the Agency is required to re-evaluate Grants QSMO Marketplace solution/services. If no Grants QSMO Marketplace offerings fit their needs, their next step must ensure the decrease of the GM IT footprint within the Agency.
<b>Implementation Planning</b>	Create a project plan leveraging best practices such as the <a href="#">M3 framework</a> to outline future work required for change management, program management, process improvement, data cleansing, etc. Implementation shall follow a phased, agile approach to reduce risk and increase the likelihood of success, and should incorporate regular touchpoints with the Grants QSMO.
<b>Technical Requirements</b>	Demonstrate how the investment will support interoperability and integration with existing and/or planned systems/solutions within the agency (e.g., agency financial management system) and with external shared services (e.g., SAM.gov, Payment Management System, Grants.gov, etc.). Consider a modular design approach to afford the agency maximum practicable opportunity for competition and flexibility should other solutions become available during the acquisition planning and award, and to avoid a customized, vendor specific solution.



## Appendix C:

<b>Evaluation Criteria</b>	
<b>Justification for Exception to Grants QSMO Marketplace</b>	
Question A	Please explain why Grants QSMO's current Marketplace offerings will not meet the requirements for your proposed investment. Have you consulted with the Grants QSMO about the potential for future Marketplace offerings that could meet your needs?
Criteria A	<ul style="list-style-type: none"> <li>○ Agency provides Grants QSMO with <i>How to Engage Grants QSMO Marketplace</i> checklist and Agency's response indicates Marketplace cannot meet needs.</li> <li>○ Agency also indicates openness to using Marketplace solution/service in the future.</li> </ul>
<b>Business Risk(s)</b>	
Question A	What operational efficiencies, audit findings, etc. will be addressed by the alternative solution?
Criteria A	<ul style="list-style-type: none"> <li>○ Agency provided explanation of drivers requiring investment.</li> </ul>
Question B	When does the agency's contract for the current solution expire? Are there options for extension?
Criteria B	<ul style="list-style-type: none"> <li>○ Agency provided details of end of period of performance for current contract or end of life for solution.</li> </ul>
Question C	What drivers are prompting the agency's investment (e.g., Congressionally-mandated timelines, impending end-of-life for existing solutions, funding expiration, etc.)?
Criteria C	<ul style="list-style-type: none"> <li>○ Agency provided explanation of drivers requiring investment.</li> </ul>
Question D	How does the scope and operational end state align to the agency's overarching technology vision?
Criteria D	<ul style="list-style-type: none"> <li>○ Agency provided sufficient information to explain how their investment aligns to their Agency's technology vision.</li> </ul>
Question E	Explain how this investment demonstrates clear support and commitment from the agency's leadership and across all affected lines of business (including agency's Office of the Chief Information Officer (OCIO) and Senior Accountable Point of Contact (SAPOC).
Criteria E	<ul style="list-style-type: none"> <li>○ Agency has provided email confirmation of support of investment from OCIO and other Agency leadership (e.g., SAPOC).</li> </ul>
Question F	How has the agency assessed its organizational readiness for change, and how has it defined a change management approach and strategies (e.g., via a Workforce Assessment )? Does the Workforce Assessment clearly identify impacted workforce and a strategy for addressing the impact?
Criteria F	<ul style="list-style-type: none"> <li>○ Agency has clearly defined Key Performance Indicators/metrics to measure progress during implementation.</li> <li>○ Agency includes Change Management Plan in the implementation plan and ongoing business plan.</li> <li>○ Agency provides Grants QSMO a comprehensive workforce impact assessment to identify any individuals impacted by improved business processes or technology and identify strategies to address impact.</li> </ul>
<b>Technical Risk(s)</b>	
Question A	How old is the agency's current solution? What is the name of the platform or software used by the current solution?
Criteria A	<ul style="list-style-type: none"> <li>○ Agency provides sufficient information describing current solution.</li> </ul>
Question B	Does the current solution have security risks/vulnerabilities?
Criteria B	<ul style="list-style-type: none"> <li>○ Agency describes security risks/vulnerabilities in detail.</li> </ul>
Question C	Will the implementation of the new solution result in a reduced number of legacy solutions (assuming the legacy solutions will be decommissioned)?

Criteria C	<ul style="list-style-type: none"> <li>Agency has provided details of the impact of the investment on planned IT consolidation.</li> </ul>
Question D	What other systems will be affected by this investment and in what way? How will those other systems' requirements be addressed?
Criteria D	<ul style="list-style-type: none"> <li>Agency provides details of how the investment will impact their other systems in their Agency's ecosystem (e.g., financial system, etc.).</li> </ul>
Question E	Has the agency considered whether there is a need for an interface with other critical systems (e.g., financial management systems) in order to support agency-wide goals for centralized data, interoperability, etc.?
Criteria E	<ul style="list-style-type: none"> <li>Agency provides evidence of planned integration with other systems.</li> </ul>
Question F	If a financial system may be affected, explain how the agency has coordinated with the Financial Management (FM) QSMO to ensure alignment to the FM QSMO's vision and guiding principles for IT investments. (To contact the FM QSMO, send an email to <a href="mailto:fmqsmo@fiscal.treasury.gov">fmqsmo@fiscal.treasury.gov</a> ).
Criteria F	<ul style="list-style-type: none"> <li>Agency obtained input from FM QSMO and it is attached to IAP.</li> </ul>
<b>Alignment to Standards</b>	
Question A	How is the agency's current solution aligned to the <a href="#">FIBF Standard Data Elements for Grants Management</a> ? How does the agency plan to ensure that this new investment will adhere to <a href="#">FIBF Standard Data Elements for Grants Management</a> ? (Please answer the question with the context that technical specifications for all grants management standard data elements are not yet complete, limiting the guidance for implementation.)
Criteria A	<ul style="list-style-type: none"> <li>Agency documents how investment currently aligns to the FIBF for Grants Management and how it will align to any future updates to the FIBF and grants data standards.</li> </ul>
Question B	How is the agency aligning <a href="#">to the FIBF Business Standards for Grants Management</a> and other business and technology standards (e.g., CloudSmart, FedRAMP, etc.) and other emerging best practices?
Criteria B	<ul style="list-style-type: none"> <li>Agency describes FIBF, business, technology standards, and best practices alignment in detail in the IAP.</li> </ul>
Question C	If this investment will affect a financial management system, require an interface to a financial management system, and/or generate any financial management transactions, how will the agency ensure this investment adheres to the Business Information Exchange (BIE) data element lists and business logic for Federal Financial Management?
Criteria C	<ul style="list-style-type: none"> <li>Agency describes relevant BIE alignment plan in detail in the IAP.</li> </ul>
Question D	Are there deviations or unique requirements? Are they justified by legislation?
Criteria D	<ul style="list-style-type: none"> <li>Agency lists all deviations or unique requirements in detail and legislation justifying them is cited.</li> </ul>
<b>Project Management and Cost(s)</b>	
Question A	Who is the sponsor for the investment and does it have cross-agency executive support?
Criteria A	<ul style="list-style-type: none"> <li>Agency provides sponsor contact information and email confirmation of support of investment from OCIO and other Agency leadership (e.g., SAPOC).</li> </ul>
Question B	Have you identified all Key Stakeholders and developed an appropriate communications plan?
Criteria B	<ul style="list-style-type: none"> <li>Agency details stakeholder engagement and communications plan in the IAP.</li> </ul>
Question C	Are you able to show benchmarking/market research for similar projects/solutions to demonstrate your estimated costs are reasonable?
Criteria C	<ul style="list-style-type: none"> <li>Agency includes benchmarking/market research in the IAP.</li> </ul>
Question D	Please share your implementation plan and explain how it leverages <a href="#">GSA's M3 Playbook</a> and demonstrates an agile, phased approach for your solution.
Criteria D	<ul style="list-style-type: none"> <li>Agency lists implementation plan (with use of M3 Playbook) in the IAP.</li> </ul>
Question E	Does this investment and implementation approach position your agency to scale up this solution to become a shared service available to external federal customers? If so, please describe.

Criteria E	<ul style="list-style-type: none"> <li>Agency has considered scalability of solution to become shared service provider (SSP) and provides reasoning for becoming or abstaining from becoming SSP.</li> </ul>
Question F	Please complete the cost table below and provide supporting Capital Planning and Investment Control (CPIC) documentation to Grants QSMO to better understand the breakout of costs required for your proposed investment.
Criteria F	<ul style="list-style-type: none"> <li>Agency includes cost table and CPIC documentation in the IAP.</li> </ul>
<b>Customer Experience and Diversity, Equity, Inclusion, &amp; Accessibility</b>	
Question A	Please elaborate on any innovations for grants management and administration that your solution/service delivers, specifically its technical abilities to reduce user accessibility barriers, such as mobile-friendly platforms, low-complexity interface, and 508 compliance (related to President Biden’s two Executive Orders on advancing racial equity ( <a href="https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/20/executive-order-advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government/">https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/20/executive-order-advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government/</a> ) and transforming customer experience ( <a href="https://www.whitehouse.gov/briefing-room/presidential-actions/2021/12/13/executive-order-on-transforming-federal-customer-experience-and-service-delivery-to-rebuild-trust-in-government/">https://www.whitehouse.gov/briefing-room/presidential-actions/2021/12/13/executive-order-on-transforming-federal-customer-experience-and-service-delivery-to-rebuild-trust-in-government/</a> )).
Criteria A	<ul style="list-style-type: none"> <li>Agency’s IAP explains how solution/service will address barriers to accessibility, 508 compliance, and/or other diversity, equity, inclusion, and accessibility initiatives.</li> </ul>